KEEP IN THE ARRANGEMENT ROOM

The Arrangement Meeting: Checklist

EverlyPro

A calm, reliable order for the meeting. Not a script: a prompt so nothing is missed and nobody feels rushed.

1 Welcome
Names, a drink, and what the meeting covers. Nothing has to be final today.

2 The person
Who they were, and any plan, will or written wishes.

3 The big choices
Burial or cremation, the kind of service, a provisional date.

4 Costs
Price list, itemised estimate, third-party fees, what's optional.

5 Paperwork
Only forms that can't wait, each one explained.

6 Next steps
Written summary, main contact, and when you'll next call.

Before they arrive: first-call details to hand · price list and options · funeral plan details · venue availability · forms for today · registration and coroner status · a quiet room, water and tissues.

THE FAMILY'S CHOICES

Arranged by _____ Date _____

Present today
Names, and who is the main contact

Registration
Registered, booked, or coroner involved

Plan, will or wishes

Burial or cremation
☐ Burial ☐ Cremation ☐ Direct cremation ☐ Green burial

Kind of service
☐ Religious ☐ Non-religious ☐ Celebration of life ☐ None

Venue
And provisional date and time

Time with them first?
☐ Yes ☐ No ☐ Not sure yet

Estimate
Total, and when payment is due

Forms signed today

Next call
When, who, and about what

BEFORE THEY LEAVE, THEY HAVE

- ☐ A written summary of what was agreed
- ☐ The itemised estimate and payment date
- ☐ What happens next, and what they need to do
- ☐ Their main contact, and a number for any hour
- ☐ When you'll next be in touch

CAN WAIT FOR A FOLLOW-UP

Music, readings and flowers

Order of service and photos

Notice wording

Clothing, jewellery and donations

Written for UK funeral homes. In Ireland, and often in Northern Ireland, most of the follow-up list is settled at this meeting.

Full guide: **everlypro.com/blog/arrangement-meeting-funeral-directors**

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